
Getting Started

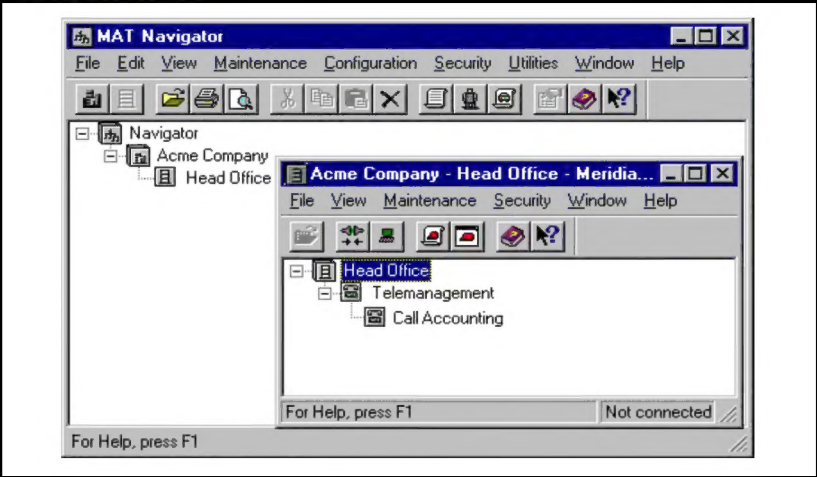
This chapter contains information on running and setting up the Call Accounting application for initial use. It also describes the main operating procedures and a suggested schedule which you should follow when using Call Accounting.

Before using Call Accounting, you must install and configure it as part of Meridian Administration Tools. Refer to Getting Started in the *MAT Common Services User Guide* for complete details on installing Call Accounting and assigning it to a site and system.

System access

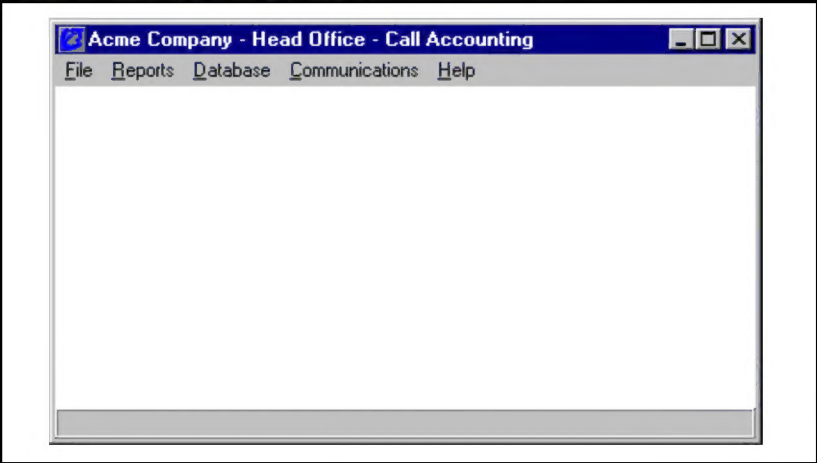
To access Call Accounting from the MAT Navigator, click the desired site and system and click Call Accounting from the Telemanagement menu.

Figure 4
MAT Navigator



The Call Accounting main window will appear.

Figure 5
Call Accounting main window



When you access Call Accounting in future sessions, it may prompt you to update its files. For example, if you access Call Accounting after changes have been made to the Station File, then it will prompt you with the message: **Changes have been made to the Station File. Do you want to resynchronize Billing Database?** In this case, click **Yes** to update the Billing Database with the Station File and start Call Accounting; or click **No** to continue without updating the database.

System configuration

The section will briefly describe the steps involved in initially setting up Call Accounting for data collection and report generation. Since the system on which Call Accounting is assigned has already been set up for communications, you will not need to enter any communications parameters at this time. The Communications Database will already have been updated.

For complete details on the functions outlined in these steps, refer to your on-line Help.

Step 1: Enter Reporting Options

The first step in configuring your system is to set up your reporting options. These options will identify the cost fields for your telephone configuration and define the layout of your reports.

To enter the reporting options for this system, click **Reporting Options** from the Database drop-down menu. The Reporting Options dialog will appear displaying check boxes and fields in which you will enter your reporting information. Click each option's check box to enable (include) it. To disable (exclude) each option, click the options' check box again and turn them off.

Step 2: Enter Telephone Configuration

The Telephone Configuration Database is the key database for costing in Call Accounting. When you enter this data, ensure that it accurately represents the telephone system which is being modeled.

Use the Telephone Configuration functions to enter information for your DDD, DID, Tie/FX trunk lines, free local calling exchanges, etc. This will supplement the data entered in the previous step.

For additional help in setting up your own configuration, please refer to the chapter entitled: *Sample Configuration*. This chapter provides a step-by-step procedure for entering a telephone configuration and can be used as a template for your own configuration.

Step 3: Update Directories

In order for your call records to accurately link to the proper employees and their extensions as well as your company's customers, you should update the Billing Database and Customer Directory with the latest employee and customer information.

Billing Database: The Billing Database contains a list of employees linked to specific extensions on the Meridian 1. When a call record is generated, it needs to be associated with a specific extension. The Billing Database contains this information as well as the division to which this employee belongs. If you have installed the MAT Station Administration application, then this is initially populated using the Set Database and can be modified periodically as required.

To view this database and add any additional records, click **Billing Database** from the Database drop-down menu and select the records from its grid.

Customer Directory: The Customer Directory contains a list of your company's customers and provides additional information for your reports. For example, this customer list can consist of frequently called numbers to further highlight detail reports. Call Accounting can identify customers by their account code or telephone number.

To view this database and add any additional records, click **Customer Directory** from the Database drop-down menu and select the records from its grid.

This completes the main steps required to initially set up Call Accounting for data collection and reporting.

Operating Procedures

Once you have initially updated the main databases and directories with your company's information, all that you need to do is to collect data and generate reports regularly. Since Call Accounting is used to perform these activities using a routine schedule, you should establish your own schedule of activities to allow for regular data collection and reporting. As well, there are a series of database maintenance functions which you should include in this schedule to keep the reports accurate.

This section outlines the standard procedures which you should incorporate into your regular operational routines. It provides a model for you to follow during the operation of Call Accounting. Use the following schedule as an outline for your own routines.

Task	Frequency
Data Collection	Daily
Report Generation	Monthly
Directory Updates	
— Billing Database	Weekly
— Customer Directory	Weekly
— Telephone Configuration	Monthly
Data Management	
— Backup All Databases	Weekly
— Restore All Databases	When recovering lost data
Database Maintenance	
— Archive Call Database	Monthly
— Purge Call Database	Monthly
— Restore Call Database	When recovering lost data

Data Collection

The collection of call records (data) from the Meridian 1 or optional Call Detail Recording (CDR) buffer unit to the computer is an important task of your Call Accounting operations. Without this detailed calling information, Call Accounting cannot produce detail reports.

Run the Data Collection procedure on a daily basis. If there is a problem with the flow of data from the Meridian 1, the system will warn you of the malfunction within a short time period. This early detection can provide for quick corrective action and minimal data loss.

To collect data for a system, click **Data Collection** from the Communications drop-down menu. It will invoke the Data Supervisor to communicate with the Meridian 1 (or buffer unit) and initiate the data collection.

During the data collection process, Call Accounting collects data from the switch or optional CDR buffer unit and builds that data into a non-formatted Call Detail file called DETAIL1.DAT. It then merges the Call Detail file into the Call Database MDR1.DAT through a process called Indexing.

Depending on the size of the buffer unit, communications would usually take place nightly when the system adds data to the Call Detail file. Less frequent collection is possible, provided the buffer units do not reach capacity.

Note: If the buffers do reach capacity and data collection has not been initiated, the system may lose valuable call records. Remember to collect data regularly.

The status of each data collection procedure is tracked through a file called the Communications Log REPLOG1.LOG and is particularly important with multi-site operations. These logs can provide a history which may be useful in solving a data collection problem.

Once CDR data has been collected from the Meridian 1, you are ready to generate reports based on this information.

Data collection troubleshooting

During data collection, Call Accounting will display the number of call records it has collected. If this number fails to increment or remains at zero, then Call Accounting has not been able to communicate with the buffer unit. In this case take the following actions.

- Ensure that the modem's **AA** (auto-answer) light is on.
- Make sure that the communications port which you specified in the Communications Database is the same as the connection on the back of your PC (the port on which you connected your cable).

The following is a list of common data collection problems.

- Data files are in use by another network workstation or the Call Database editor is opened.
- Communications parameters are not set up properly for the system using the System Properties function of the MAT Navigator.
- Data collection parameters are not set up properly in the Communications Database.
- The PC has insufficient disk space for both the Call Detail file and the Call Database.

Report generation

The Call Accounting reports provide information on the details of the call records which were collected from the Meridian 1. They also include information on your system databases and configurations. Once you have collected the call records from the Meridian 1, you should then generate your detail and summary reports to cost and display their information.

Step 1: Select Output Device

Call Accounting can send reports to a selected output device such as printer, screen or file. To select the output device, click **Select Output Device** from the File drop-down menu and click the desired option button.

If you are sending the reports to the printer, then you can select the type of printer using the Printer Setup function. This function will list all of the printers you have set up for the different ports using the Windows Setup Printer function. To select a printer for Call Accounting, click **Printer Setup** from the File drop-down menu. A dialog will appear prompting you to select a printer and its font style. Select your printer and font from the available list boxes and click **OK** to save these settings and return to the main window.

Step 2: Select Report Filters

Before you generate your reports, you should select the parameters (filters) which determine the data ranges on which the reports are run. This will include only the desired range of data. To enter your reporting filters, click **Select Report Filters** from the Reports drop-down menu. The Select Report Filters dialog will appear listing all the available filters which you can select.

To select the reporting filters, click the command button labeled with the filter name. Another dialog for that filter will appear containing open fields in which you can enter your minimum and maximum ranges. You can include or exclude a filter range. To select a filter range and have the system include its range, click the desired command button, enter the filter range and click **OK** from the range dialog. The Include check box will be turned on next to that filter command button. If you wish to exclude this range, click the **Exclude** check box for the filter.

To save these filters, click **Close** from the Select Report Filters dialog. At the prompt: **Save Changes Before Closing?** click **Yes** and exit to the main window. To exit from this dialog without saving the filters, click **No** when prompted. If you wish to copy this filter file to another file, click **Save As** and enter the new filename in the dialog which appears.

Step 3: Generate reports

Once you have selected your parameters, return to the main menu and click the report type heading (e.g., Cost Allocation) from the Reports drop-down menu. From this cascading menu, click the report you wish to print (e.g., Extension Detail Report). Select the priority through which you wish to sort this report. Click the drop-down list box at each sort priority and select the desired sort items.

When you first run this report, initialize and produce the Summary file. To initialize this file, ensure that the **Initialize summary file** check box is on. To produce this file, ensure that the **Produce summary file** check box is on. If you have not changed any of the report filters for the Call Database, Billing Database, Other Billable Items Database, Customer Directory or Telephone Configuration since the last time you reset the Summary file, then turn off (blank field) these check boxes. To run the report, click **OK**. Call Accounting will now generate the report to the system's current output device.

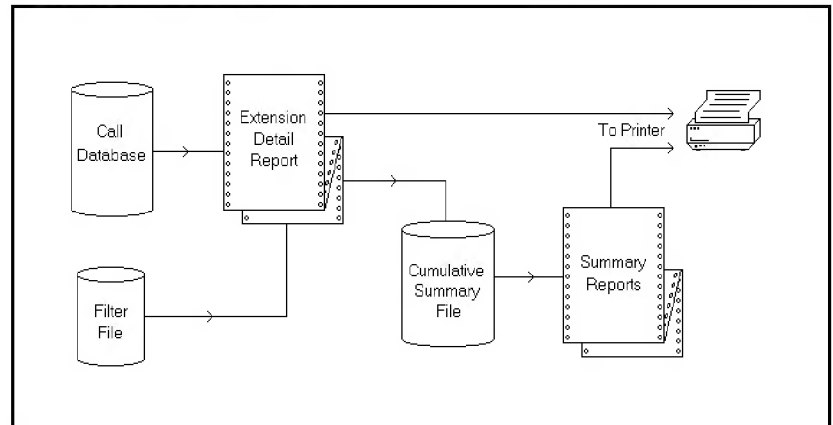
If you wish to schedule a report to run at a specific date and time, click **Schedule**. This will invoke the Scheduler application from MAT Common Services. Use this function to enter the date and time that you wish to run the report. It will then generate it at the selected date and time.

To run a 'month-end' report including the Extension Detail, Department and Division Summary reports, you would run the Extension Detail Report first and initialize the Summary file. This reduces the run time for the summary reports.

Note: If you are not generating the Extension Detail Report, be sure to initialize the Summary file when you run the first report. This will ensure that the system will compile the appropriate summary data prior to printing the report.

The following diagram displays the interaction of the major data files during a report generation.

Figure 6
Report generation flow



Directory updates & data management

Call Accounting contains a set of functions to assist you in managing your system's databases. Proper management of data will ensure that your reports contain timely and accurate information. If the Call Accounting databases and directories contain outdated information (e.g., the Billing Database contains employees who are no longer with the company), then the reports will be inaccurate. You should therefore regularly update your databases.

As well, it is important to make backup copies of the main Call Accounting database files for recovery purposes. This way, if your PC loses data (e.g., in case of hardware or disk failure), you can more easily recover the lost data.

The following sections describe the database editing functions as well as the Backup and Restore commands used for the main databases and directories. Since the Call Database requires different maintenance commands, the Archive, Purge and Restore Call Database functions will be discussed in the next section.

You must decide on the frequency of the backup and archive procedures. Base this frequency on the size of your data records and your system capacity. As a rule, you should back up your data once a month.

Directory updates

In order for your Call Database records to be costed and applied correctly, you must periodically update and manage user-definable databases. These include the following:

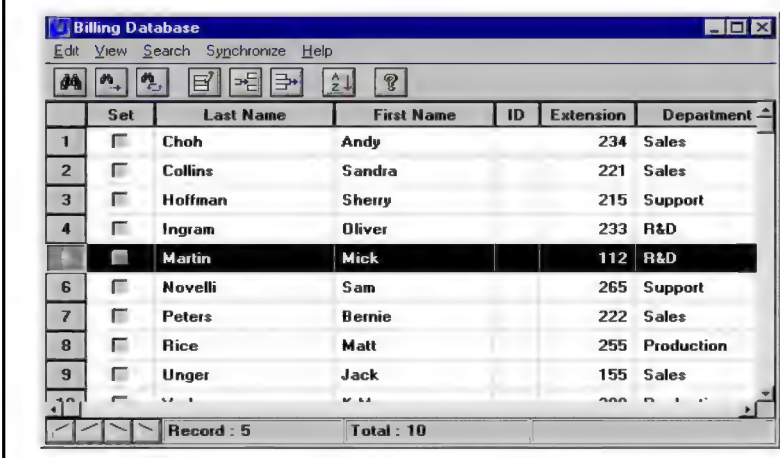
- Billing Database
- Customer Directory
- Telephone Configuration Database
- Communications Database
- Other Billable Items

Each database contains an editor with standard features which you can use to edit, insert and delete records. The following sections will describe the common components and features of these database dialogs.

To enter the database information, click the directory name from its appropriate drop-down menu. The database dialog will appear containing a grid in which you can enter the records for that database. It will also contain function tools which you can use to manage these records.

Some directory dialogs will list the position of the current record in the database in relation to the total number of records in the database.

Figure 7
Sample Billing Database



	Set	Last Name	First Name	ID	Extension	Department
1	☐	Choh	Andy		234	Sales
2	☐	Collins	Sandra		221	Sales
3	☐	Hoffman	Sherry		215	Support
4	☐	Ingram	Oliver		233	R&D
5	☒	Martin	Mick		112	R&D
6	☐	Novelli	Sam		265	Support
7	☐	Peters	Bernie		222	Sales
8	☐	Rice	Matt		255	Production
9	☐	Unger	Jack		155	Sales

Record : 5 Total : 10

Grids

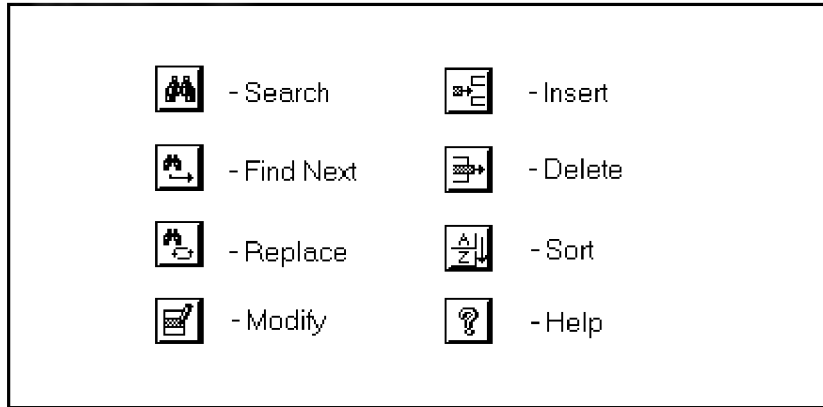
A database record is displayed in the grid of its dialog. A grid is comprised of rows (records) and columns (fields). To scroll through a grid, click its horizontal and vertical scroll bars.

Field Sizes: If you wish to change the grid's proportions, click the row and/or column border and drag it to the new position. Notice that the row (or column) will change size.

Field Positions: If you wish to rearrange the column sequence in a grid, highlight the column by clicking its field header. Next, click the column and drag it while simultaneously pressing the <Ctrl-Shift> keys. The column border will move as you drag the cursor across the grid. Release the cursor to place the column in its new position.

Tools: Each grid contains a toolbar that contains standard editing features such as Search, Replace, Modify, Insert and Delete. These tools can be used instead of selecting a specific function from the grid's menu bars.

Figure 8
Toolbar summary



Insert

To enter a record in a grid, click **Insert** from the Edit drop-down menu. An editor dialog will appear prompting you to enter the record's information. Type in the information in this editor's fields. To save this information and exit from this dialog, click **OK**. This will insert the information into the first available record in the grid. If you highlighted a specific row of the grid, then the system will insert this record above the specified row.

Certain databases will distinguish between adding a record or inserting a record to the database grid.

Add: To enter a record at the end of the database, click **Add** from the editor dialog. To enter a record immediately after a specific record, highlight that record and click **Add**.

Insert: To enter a record at the beginning of the database, click **Insert** from the editor dialog. To enter a record immediately before a specific record, highlight that record and click **Insert**.

Once you insert or add a record, an editor dialog will appear allowing you to enter data into the record's fields. Enter this information as required and click **OK** to save the record. The system will display another blank dialog allowing you to add another record. Once you have added the required records, click **Close** to save this information and exit to the grid dialog. Notice that the record lines in this grid will appear updated.

Modify

To modify a record in the grid, highlight the record by clicking it and clicking **Modify** from the Edit drop-down menu. An editor dialog will appear prompting you to edit the record's information. Click the fields of that record to edit its information and type the new text over the old. To save this information and exit from this editor dialog, click **OK**. The new information will appear in the record of the grid.

Delete

To delete a record from the database grid, click the record row header to highlight it and click **Delete** from the Edit drop-down menu. You can also use the **Delete** icon from the toolbar to delete the highlighted record.

Sort

Use the Sort command to sort the records in the database according to specific criteria. These are based on the database fields. To sort the database, click **Sort** from the Edit drop-down menu. This will access the Sorting Priority dialog in which you can enter the sort criteria for the records (e.g., alphabetically by surname).

To enter the sorting criteria for the database records, highlight the specific criterion from the Available Sorting Fields list box and click the double right arrow (>>) command button. You can also select this criterion by double-clicking the record line. The selected sorting criteria will appear in the **Fields to Sort By** list box. Once you have selected the criteria, click **OK** to initiate the sorting procedure.

Search (Find)

To search for a specific record in the database, click **Find** from the Search drop-down menu. This will access a dialog in which you can enter the search criteria for the desired record. Enter these criteria in the Search For fields and click the **Include** check box for each field to turn it on. Click **OK** to search for the first record matching these criteria. If the system reaches the end of the database without finding a record matching these criteria, it will prompt you with a message: **Search field(s) not found.**

You can also search for records based on minimum criteria. Use the wild-cards (asterisk '*' and question mark '?') to fill in the remaining values for more specific search criteria.

The following example will demonstrate the use of this function.

To search for employees in departments beginning with 'L', click the **Search** icon and perform the following steps.

- 1 Enter: **L*** in the Department field and click **OK** to start the search procedure. The system will search for the first record containing the 'L' as the first letter in the Department field.
- 2 Click the **Find Next** icon, to find the next instance of the record matching the current search criteria.

Replace

Use the Replace function to search for a specific record matching a defined search criteria and replace it with another value. To access this function, click **Replace** from the Search drop-down menu tool to access this database's editor dialog. Next, enter the search criteria in each 'Search For' field and enter the values with which you wish to replace them in the adjacent 'Replace By' field. Click the **Include** check box to turn it on and click **OK** to start this procedure.

The following example demonstrates this function.

To change all the records containing the 'Programming' department to 'Development', click the **Replace** icon in the Billing Database dialog and perform the following steps.

- 1 In the Department Search For field, enter: **PROGRAMMING**. In its Replace By field, enter: **DEVELOPMENT**.
- 2 Click its **Include** check box to turn it on.
- 3 Click **OK** to start this function. The system will search for the first record containing 'Programming' in the Department field and replace it with 'Development'.

Replace All: If you wish to replace all records which match certain criteria, click **Replace All** in the Replace dialog. This function will replace every record containing the search criteria without displaying the records on the screen for confirmation.

Prompt On Replace: Click this check box in order for the system to display the records on screen for confirmation. To confirm the replace action, click **Yes**.

Once you have entered the information in the database editor dialog, click **OK** to save it and exit to the previous window.

Summary of steps for directory updates

This section summarizes the steps required to update the three main database files. They are the Billing Database, the Customer Directory and the Telephone Configuration Database. Update these databases on a regular basis in order to keep your reports accurate.

Billing Database

The Billing Database controls the distribution of costs to the different cost centers within the company or organization. It is extremely important to have each extension's charges allocated to the appropriate department or division. Update this directory on a weekly or monthly basis depending on the size of the directory and the frequency of changes.

To avoid any problems, follow these guidelines during your Billing Database updates.

- 1 From the Reports drop-down menu click **Directory/Configuration** and then click **Billing Database Report**. Choose the desired sort order from the Billing Database Report dialog and choose whether or not authorization codes are to be printed.
- 2 Print the Billing Database Report.
- 3 On the hard copy printout of this report, enter the changes that have occurred over the past month (e.g., new department, staff moving to another department, new extensions, etc.).
- 4 Enter the new changes into the Billing Database.
- 5 Print the Billing Database Report again and verify your changes. Save this hard copy printout to track changes over a long time frame without having to repeatedly access the system.

Customer Directory

The Customer Directory uses a format similar to the Billing Database. To avoid errors in this directory, print a copy of the directory and check it for errors. Remember to update this directory weekly or monthly depending on its size.

- 1 Click **Reports** and click **Directory/Configuration**. From this cascading menu, click **Customer Directory Report**.
- 2 Choose your sort order and print the report.
- 3 Check the validity of the data and make appropriate changes.
- 4 Enter these changes in the database (click **Customer Directory** from the Database drop-down menu).
- 5 Print the new report and save it for future reference.

Telephone Configuration Database

The Telephone Configuration Database contains the information needed to cost services such as DDD and tie lines. Periodically, you may be required to enter changes to ensure the accuracy of your pricing system. These changes may involve edits to the rate tables, carrier pricing templates or to the trunk tables.

The following suggested procedure is similar to that outlined in the Billing Database editor.

- 1 From the Reports drop-down menu, click **Directory/Configuration** and then click **Configuration Diagnostic Report** to print the Telephone Configuration settings. Ensure that the Print Configuration File Contents and the Print Diagnostic Report check boxes are turned on. Click **OK** to print the report.
- 2 Check that the information on this report is complete (including the diagnostics at the end of the report).
- 3 Review the information for accuracy with the appropriate personnel.
- 4 Make the appropriate changes to the Telephone Configuration Database.

Data management

Call Accounting provides you with tools to back up and restore your main databases. It is important to maintain backup files of these databases on floppy diskettes for security purposes. If your disk drive fails or you erase valuable database files, you can recover this data from your backup diskettes. Storing alternate copies off-site is also beneficial for disaster recovery.

Backup All Databases

If you need to make a backup copy of some or all of the Call Accounting database files, use the Backup All Databases function. The backup command will save the data files specified for the current system.

Note: This will only make a backup copy of the Call Accounting database files. If you wish to backup other MAT system files, then use the application to which the database files belong or use the MAT Site Configuration application.

To run the Backup procedure, click **Backup All Databases** from the Database drop-down menu. Select the drive and directory by typing them into the Destination Directories field of the dialog which appears and click **OK**. The Backup All Databases dialog will appear listing the database descriptions, source filenames and backup filenames for the current system. Choose from the following list of databases to back up.

System Options	General system parameters
Telephone Configuration	Telephone configuration information
Location Book Registry	Defined location books
Carrier Pricing Template	Carrier pricing definitions
Communications Database	Communications Database file
Billing Database	Employee and extension information
Customer Directory	Customer name and account information
Call Detail File	CDR detail data, if any
Call Database	Indexed CDR data using Index file
Index file	Used to index and trace through Call Database
Select Report Filters	Report filter information
Summary File	CDR summary information
Auto Backup	Used if auto backup is activated
Other Billable Items	Additional costs not associated with calls
Report File	Output sent to disk

To make a backup copy of a specific file, turn on the Include check box for that site file. If you wish to make backup copies of all of the files, click **Include All**. If you wish to exclude all the files, then click **Exclude All**.

Confirm Overwrites: Turn this check box on if you wish a confirmation prompt to appear before the system replaces any files existing on the diskette with the same filename as those you are backing up.

Variable Rates File: To make backup copies of any Variable Rate Files, Dial Codes, Charge Bands or Time Bands, click **Variable Rates File**. A dialog will appear listing the various rate filenames. To make a backup copy of a specific file, turn on the Include check box for that site.

International Rates: Click International Rates to make backup copies of any International Rates files.

Holiday File: Click Holiday File to make backup copies of any Holiday Files.

Click **Close** to initiate the backup procedure for these files and exit to the Backup All Databases dialog.

Location Books: To make backup copies of any Location Book files, click **Location Books**. A dialog will appear listing the various Location Book filenames. To make a backup copy of a specific file, turn on the Include check box for that site. Click **Close** to initiate the backup procedure and return to the Backup All Databases dialog.

Backing up to floppy diskettes

If you are backing up to a floppy drive, insert the diskettes as the system prompts you. The Backup All Databases function provides you with two additional options when backing up to a floppy drive:

- Delete Existing Files On Floppy
- Confirm Deletes

Delete Existing Files On Floppy: Turn this check box on if you wish to delete all the files from the current disk onto which you are backing up your files.

Confirm Deletes: If the Delete Existing Files On Floppy check box is turned off, then turn this check box on if you wish the system to prompt you before deleting any files located on the diskette.

Note: Ensure that you label the destination diskettes correctly. When you restore the files, the system will not allow you to restore the files if the diskettes are out of order.

When you are ready to make backup copies of your files, click **OK**.

Restore All Databases

The Restore function allows you to restore any data you may have lost by copying the Call Accounting database files you have previously backed up using the Backup All Databases function.

To restore the files you saved using the Backup function, click **Restore All Databases** from the Database drop-down menu. The Restore All Databases dialog will appear prompting you to enter the drive and directory from which you wish to restore the files (e.g., A:). Enter this information and click **OK**.

To restore a specific file, turn on the Include check box for that site. If you wish to restore all of the files, click **Include All**. If you wish to exclude all the files, then click **Exclude All**.

If you are restoring files from a floppy drive, insert the first diskette in the drive. This contains the directory for these database files. Place the proper diskettes in the drive as the system prompts you.

Confirm Overwrites: Turn this check box on if you wish a confirmation prompt to appear before the system replaces any files existing on the diskette with the same filename as those you are restoring.

Variable Rates File: To restore any Variable Rate Files, Dial Codes, Charge Bands or Time Bands, click **Variable Rates File**. A dialog will appear listing the various rate filenames. To restore a specific file, turn on the Include check box for that site.

International Rates: Click this command button to restore any International Rates Files.

Holiday File: Click **Holiday File** to restore any Holiday Files.

Click **Close** to initiate the restore procedure and return to the Restore All Databases dialog.

Location Books: To restore any Location Book files, click **Location Books**. A dialog will appear listing the various Location Book filenames. Click **Close** to initiate the restore procedure and return you to the Restore All Databases dialog.

When you are ready to restore your files, click **OK**.

Call Database maintenance

The Call Database requires special attention because it contains the call data collected from the Meridian 1 which can potentially become too large to manage easily. Failure to manage this file properly will result in longer processing times and a waste of hard disk space. Since the Call Database records contain specific calling information including their date and time, you can use date and time filters when using the Archive, Purge and Restore functions.

To manage the Call Database file, click **Utilities** from the Database drop-down menu and click **Call Database** from its cascading menu. The following sections describe the Call Database maintenance functions: Archive, Purge and Restore.

Archive Call Database

The Archive function stores your old data to a separate medium providing you with more working memory on your disk.

To archive the Call Database, click **Archive** from the Maintenance drop-down menu of the Call Database dialog. In the Filter fields, enter the minimum and maximum filter ranges. To include a range, click the filter's command button (e.g., **Time**), enter the range and turn on the Include check box for this filter. Repeat this step for all the filters you wish to include.

Note: If you wish to erase the data from your working directory when you archive it (essential if you have limited disk space), turn on the **Purge selected records** check box. This will move the records from the working drive and directory to the archive drive.

To save this filter file, click **Save Filter**. A dialog will appear prompting you to enter the destination drive, directory and filename where you wish to save this filter. Enter the drive and directory in its fields and click **OK** to save the file.

To reuse an existing filter file, click **Load Filter**. A dialog will appear prompting you to enter the filter name. Enter this information in the appropriate fields and click **OK** to load the file.

If you are archiving to a floppy drive, ensure that you place the diskettes in the drive as the system prompts you. Number each disk so you can maintain the proper order of data when restoring.

If you wish to schedule the Archive function at a specific date and time, click **Schedule**. This will invoke the Scheduler application from MAT Common Services. Enter the date and time on which you wish to archive the data. The Scheduler will then perform this activity at the selected date and time.

Note: Remember to run your reports before archiving your data. You may inadvertently archive and remove data needed for a monthly report.

Purge Call Database

If you do not wish to retain past data, use the Purge Call Database function to erase the data and thus reduce the size of the Call Database. The Purge function permanently removes data from the system.

To purge call records from the Call Database, click **Purge** from the Maintenance drop-down menu of the Call Database dialog. A filter dialog will appear containing the specific filters you can define for the call records you wish to delete. In these fields, enter the minimum and maximum ranges. To include a range, select your option, enter your range and turn on the Include check box for this filter. Repeat this step for all the filters you wish to include.

To save this filter file, click **Save Filter**. A dialog will appear prompting you to enter the destination drive, directory and filename where you wish to save this filter. Enter the drive and optional directory in its fields and click **OK** to save the file.

To reuse an existing filter file, click **Load Filter**. A dialog will appear prompting you to enter the filter name. Enter this information in the appropriate fields and click **OK** to load the file.

If you wish to schedule purging at a specific date and time, click **Schedule**. This will invoke the Scheduler application from MAT Common Services. Enter the date and time that you wish to purge the data.

Restore Call Database

During the Restore operation, Call Accounting appends the restored data to the end of the current Call Database file. Therefore, it is important to manage the Archive and Restore procedures so that the data in the Call Database is always in chronological order. This is especially important for report generation.

Note: Do not restore the data from the archive diskettes to the working directory unless you are sure that the data from the working directory was previously purged. Otherwise, the data records will be added to the existing data and data records could become duplicated, thus reducing their validity.

To restore data, click **Restore** from the Maintenance drop-down menu of the Call Database dialog. Another dialog will appear prompting you to specify the drive, directory and filename of the data to be restored. Verify that this information is correct and click **OK** to restore the data.

Summary of tasks

The following is a summary of the major tasks described in this chapter as they are run by time period.

Daily tasks

- 1 Collect CDR data from your buffer box (it is recommended that you use a buffer box to store CDR data). Collections can be scheduled to occur automatically every day or they can be manually invoked each day. If you are not using a buffer box, a dedicated PC Com Port will continuously collect the CDR data as it is output from the Meridian 1.
- 2 View the log daily to ensure that your scheduled collection was successful. A list of the number of records collected by date can be found in the Database drop-down menu, under Utilities-List Call Database Dates.

Ongoing tasks (recommended weekly)

- 1 Synchronize Billing Database with Station Administration. If the Billing Database is not in synch with the Station Database (one or more changes have been made in Station), a dialog will prompt to ask you if you wish to synchronize the database when you access the Billing Database. If you click **Yes**, the Call Accounting Billing Database will automatically update to accommodate any changes you made in Station Administration.

If you are not using the Station Administration application, you will need to perform your Call Accounting Billing Database updates manually.

- 2 Update Customer Directory. The Customer Directory assigns customer names to digits dialed. The reports can then include not just the dialed number but also the customer name. If you use the Customer Directory, it should be updated periodically.
- 3 Perform database backups. As with any database, you should perform a regular backup of your data to disk or hard drive.

Monthly tasks

- 1 Select your reporting filters to ensure that you are reporting on the correct subset of the collected data. Typically this will include setting the date for your reporting period.
- 2 Run your monthly reports.
- 3 Purge or archive your data. The Purge Call Database function will delete the data from your hard drive completely. The Archive Call Database function will store the call records to a disk or hard drive.

Help

As with the other MAT applications, Call Accounting contains an extensive Help facility which provides you with details on all of its functions and commands. At any time during your Call Accounting session, you can click **Help** and access information on a specific topic.

To obtain help for a topic, click **Help** from the currently selected dialog or window. This will access the Windows Help function and display context sensitive help information on the current topic.

Once you have accessed Help, you can then use it to scroll through the other Call Accounting help topics, search for a specific topic and print the help information.

To view a list of Help topics for Call Accounting, click **Contents** from the Help drop-down menu. Choose from one of the items in this list to load the Help file and display its information.